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BC Stats

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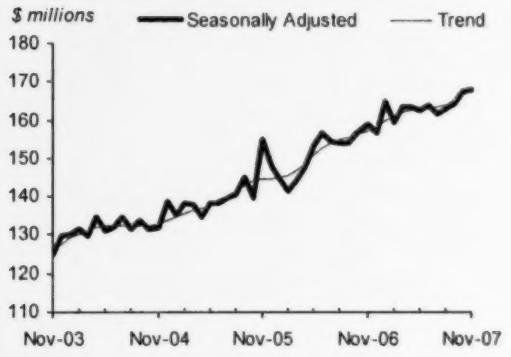
Tourism Sector Monitor ◆ February 2008

Room Revenue

Room revenues advanced 0.3% in November, maintaining the upward trend that began in August. The Interior, including Kootenay (+5.4%), Thompson/Okanagan (+4.0%) and Cariboo (+3.2%), outperformed the rest of BC. Nechako (+1.1%) recorded gains for the fifth consecutive month, surpassing growth in neighbouring Northeast (+0.2%). Accommodations in Vancouver Island/Coast (+0.3%) had a more lucrative month, while North Coast (-1.9%) and Mainland/Southwest (-1.3%) saw revenues slip following increases in October.

Room revenues continued an upward trend in November



A three-month-long upturn in revenues at the province's hotels ended in November (-1.2%), as large (151-250 rooms; -3.2%), very large (251+ rooms; -2.0%) and small (1-75 rooms; -0.5%) hotels posted declines. On the other hand, business was up at mid-sized hotels (76-150 rooms; +0.6%) and motels (+1.0%). Although revenues at vacation rentals (-2.9%) decreased, gains at fishing lodges, bed and breakfasts, and other types of accommodation (+4.1%) pushed the overall average for other accommodations into positive territory (+0.4%).

Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type	Nov 07 ($000)	Oct 07 ($000)	% change
Total	168,017	167,442	+0.3
Hotels	123,809	125,339	-1.2
Motels	20,302	20,101	+1.0
Other Accommodations	22,461	22,376	+0.4
Regions (Top 3 performers)			
Kootenay	9,023	8,558	+5.4
Thompson/Okanagan	26,456	25,442	+4.0
Cariboo	5,568	5,395	+3.2

Visitor Entries

Total visitor entries to Canada via BC were relatively flat (+0.1%) in November. Entries from the US fell (-1.1%) for the first time since July reflecting fewer overnight visitors (-1.9%). However, the number of Americans on same-day trips advanced 0.3%, ending two months of declines.

Visitor volume from overseas countries rebounded (+4.6%) on the heels of a 5.3% decline in October. A jump in visitation from Oceania (+8.5%) and Asia (+7.6%) contributed to the highest month-over-month increase in 2007. However, entries from Europe (-2.1%) were down.

Significantly more (+10.6%) Canadians returned home via BC in November. Total (+11.7%) and same-day (+6.9%) trips to the US were up, and the number of travellers returning home from trips overseas also increased (+3.4%).

Visitor entries inched up in November

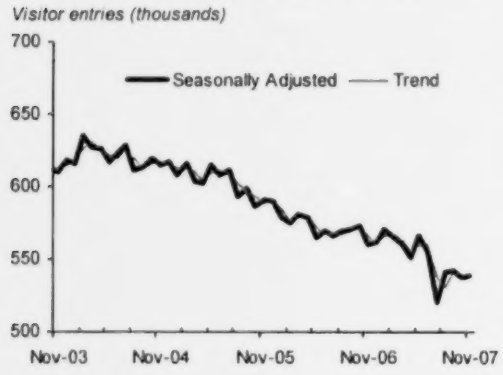


Table 2. Traveller Entries
(seasonally adjusted)

	Nov-07 ('000)	Oct-07 ('000)	% chg from Oct-07
American visitors			
Total	412	417	-1.1
Same-day	135	135	0.3
Overnight	277	282	-1.9
Overseas visitors			
Total	126	121	4.6
Europe	41	42	-2.1
UK	20	21	-0.4
Asia	58	54	7.6
Japan	16	16	1.6
Taiwan	4	5	-19.3
Oceania	16	15	8.5

(BC Stats & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

The province's hotel occupancy rate inched higher (+0.3 percentage points) to 68.0% in November. However, the average daily room rate for BC hotels ($131.90) was relatively unchanged (-0.1%) from the previous month.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Nov-07	Change from Oct-07
Hotel Industry		
Occupancy rate (%)	68.0	0.3 pp
Average room charge ($) *(Pannell Kerr Forster)*	131.90	-0.1
Airport Passengers	**(000s)**	**(%)**
Vancouver International Airport		
Total traffic	1,539	5.3
US (trans-border)	385	6.0
Other International	364	8.6
Canada (domestic) *(YVR)*	789	3.6
Victoria International Airport		
Total traffic *(Victoria Airport Authority)*	128	0.9
Food Services Receipts	**($ millions)**	**(%)**
All establishments *(Statistics Canada)*	667	2.1
Transportation	**(000s)**	**(%)**
Coquihalla Highway		
Passenger Vehicles *(Ministry of Transportation)*	247	7.9
BC Ferries		
Vehicle Volume	720	1.4
Passenger Volume *(BC Ferries)*	1,825	1.9
Exchange Rates	**Cdn $**	
US $	1.034	+0.01
UK Pound	0.500	0.00
Japanese Yen	114.758	-4.01
Australian $ *(Statistics Canada)*	1.155	+0.01

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a **seasonally adjusted** basis.

Passenger volume at both the Vancouver (+5.3%) and Victoria (+0.9%) airports rose in November. The province's ferry system was also busier, as BC Ferries recorded an increase in passengers (+1.9%) and vehicles (+1.4%). In addition, there was a surge (+7.9%) in the number of passenger vehicles travelling on the Coquihalla Highway.

2008-03325/

BC's food services and drinking places industry experienced higher revenues (+2.1%, *seasonally adjusted*) in November, as sales at drinking places and food service establishments increased.

A look ahead—December 2007

Preliminary estimates suggest that provincial room revenues ended 2007 on a high note, up 0.4%. Cariboo and Mainland/Southwest (each at +2.1%) recorded the strongest growth, while Northeast (+1.4%) and North Coast (+0.3%) also experienced increases. However, the rest of BC, including Nechako (-6.1%), Kootenay (-3.8%), Vancouver Island/Coast (-2.5%) and Thompson/Okanagan (-1.2%), saw revenues fall in December.

Returns at hotels rebounded (+2.0%) in December, driven mainly by a surge (+6.4%) at very large hotels (251+ rooms). However, large (151-250 rooms; -2.0%) and small (1-75 rooms; -0.4%) hotels saw their revenues fall for the second consecutive month. Motels (+0.7%) were busier and vacation rentals (+5.6%) ended a three-month-long downturn. Growth at fishing lodges, bed and breakfasts, and other types of accommodation (+0.1%) was relatively flat.

Visitor entries to BC were down (-1.4%) in December, marking the seventh month of declines in 2007. US entries continued to fall (-2.4%) as fewer same-day (-3.8%) and overnight (-1.8%) trips by Americans were recorded. However, overseas entries increased (+2.0%) as a result of an influx of visitors from Europe (+6.1%) and Oceania (+3.2%). Entries from Asia (-0.1%) were relatively unchanged from November.

Transportation indicators were down in December. Victoria (-2.3%) and Vancouver (-2.1%) airports saw a drop in passenger volume, and the number of vehicles (-1.2%) and passengers (-1.0%) aboard BC Ferries fell. Traffic along the Coquihalla Highway (-9.4%) was also lower compared to the previous month.

About preliminary numbers

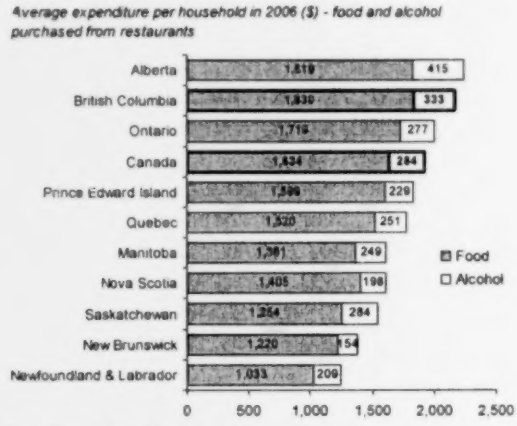
Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 21 reports in 2006 and 2007, BC room revenues changed (rose or fell on a month-over-month basis) on average by 2.4% (absolute value). The preliminary numbers—reported in the "look ahead" section—were less by an average of 0.2 percentage points partly because the initial data retrieved may not be complete until later that month. For example, if the preliminary figure is 1.5, the actual number probably is around 1.7. And if the preliminary figure is -0.5, the actual number is about -0.3.

Special Focus: Eat, Drink and Be Merry: BC's Food Services and Drinking Places Industry

In 2006, the average BC household spent $1,830 on restaurant meals, the highest expenditure among the provinces and more than a quarter (26%) of the total food budget. Although significantly less ($333) was spent on alcoholic beverages served at licensed premises, this represented more than a third (34%) of total household expenditures on alcohol. Overall, BC ($2,163) has the second highest per capita consumption of food and alcohol purchased from restaurants in Canada. Although household food expenditures in Alberta ($1,819) were lower than BC's, alcohol purchases ($415) were 25% higher.[1]

Only Albertans spend more at restaurants than BC residents



Data Source: Statistics Canada

BC's industry is the third largest in Canada

The food services and drinking places industry is an important segment of the BC economy, accounting for $2.6 billion – about 2% – of the province's gross domestic product (GDP) in 2006. Tourists represent a significant market for the industry, with about a quarter of its GDP generated by tourism-related activities. There are more than 12,000 food service establishments, providing employment for about 1 in 10 workers in BC's service sector.[2]

According to data from Statistics Canada's *Monthly Survey of Food Services and Drinking Places*, the BC industry earned about $7.6 billion in revenues during 2007. Over the 1998 to 2007 period, provincial receipts averaged 16.5% of national sales, the third highest in the country after Quebec (20.2%) and Ontario (38.5%).

Structure of the industry

The food services and drinking places industry includes full-service restaurants (patrons order while seated and pay after eating), limited-service eating places (patrons order at a counter, and/or by phone and pay before eating), special food services (including food service contractors, social caterers and mobile food services) and drinking places such as bars, nightclubs and taverns. Most establishments are either full-service restaurants (45%) or limited-service eating places (42%). Special food services comprise 8% while only 5% are drinking places.

[1] Source: Statistics Canada, *Survey of Household Spending in 2006.*

[2] Source: Statistics Canada, *Survey of Employment, Payrolls and Hours.*

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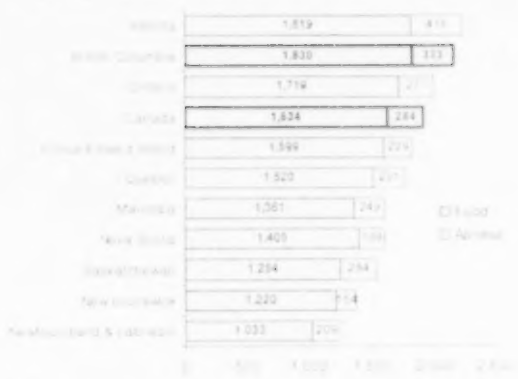
Average expenditure per household in 2006 ($) - food and alcohol purchased from restaurants



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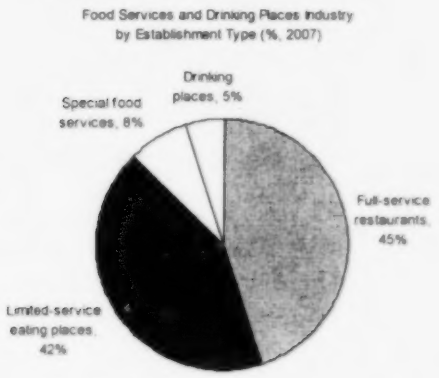
9 out of 10 establishments are full- or limited-service restaurants

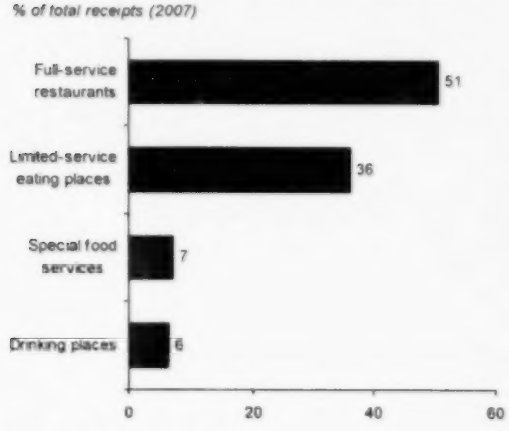

Food Services and Drinking Places Industry
by Establishment Type (%, 2007)
Drinking places, 5%
Special food services, 8%
Full-service restaurants, 45%
Limited-service eating places, 42%

Data Source: Statistics Canada

Revenues at food service and drinking establishments

Full-service restaurants accounted for just over half (51%) of total provincial receipts in 2007, estimated at $3.9 billion. Limited-service eating places generated $2.8 billion (36%), while the remainder was split between special food services ($544 million, 7%) and drinking places ($480 million, 6%).

Most of the industry's revenues are generated by full-service restaurants

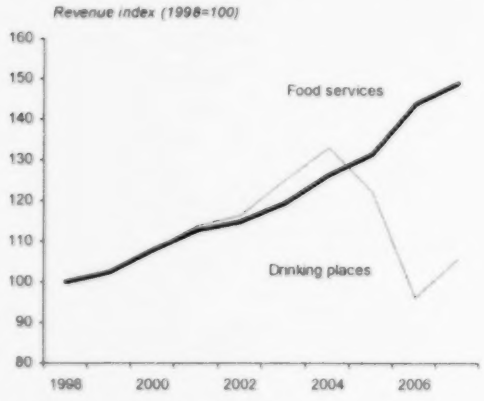


Data Source: Statistics Canada

From 1998 to 2007, BC's food services and drinking places industry experienced a 45.1% increase in receipts, almost identical to the national average (+45.3%). Growth in the industry has been driven by the food services sector (full-service restaurants, limited-service eating places and special food services), which recorded a 48.8% gain.

Revenue growth at drinking places was keeping pace with the food services sector up to 2004, but took a dive in 2005 and 2006 while revenues at food service establishments continued to increase. Although sales at the province's bars, nightclubs and taverns rebounded (+10.0%) in 2007, they are still below 2000 levels. Overall, total receipts rose only 5.8% from 1998 to 2007.

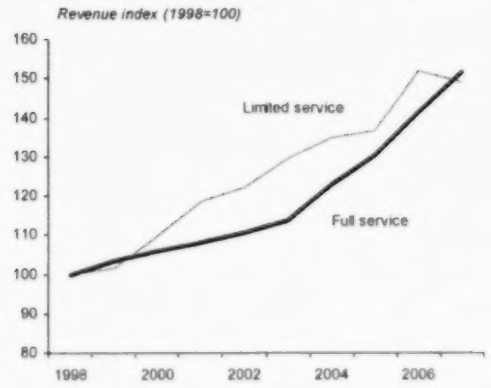
Sales trending up in food services; drinking places saw declines in 2005 and 2006



Data Source: Statistics Canada

With respect to the restaurant segment of the industry, sales at full-service (+51.5%) and limited-service (+48.9%) restaurants increased at similar rates over the 1998 to 2007 period. From 1998 to 2003, revenue growth at limited-service eating places was more than twice the rate at full-service establishments. There was a shift in the industry in 2004 as full-service sales picked up and began to outperform their limited-service counterparts.

Revenue growth at limited-service eating places has lost ground in recent years

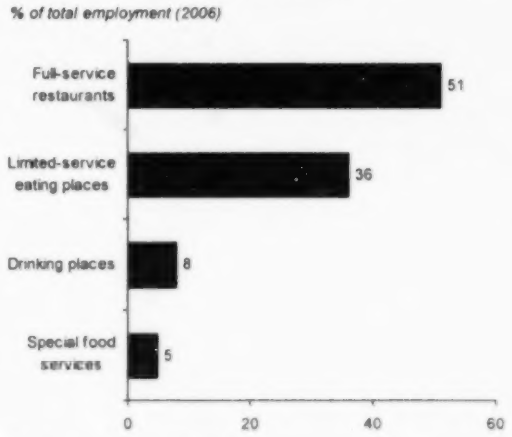


Data Source: Statistics Canada

Employment

In 2006, there were about 135,000 people employed in BC's food services and drinking places industry, which accounted for 9% of jobs in the service sector.[3] Most workers (51%) were employed at full-service restaurants, while more than a third (36%) worked at limited-service eating places. Drinking places (8%) and special food services (5%) employed a relatively small share of workers in the industry.

Half of the jobs in the industry are at full-service restaurants



Data Source: Statistics Canada

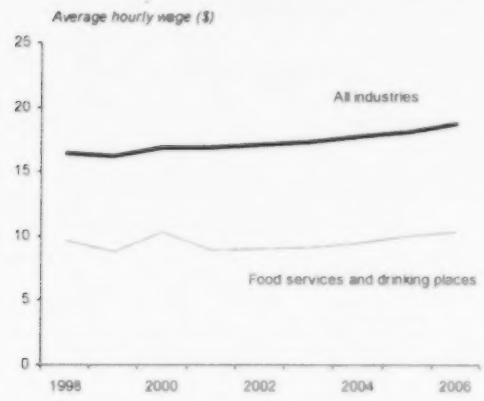
From 1998 to 2006, employment at food service establishments and drinking places increased faster (+23.2%) than the all-industry average (+19.5%). Employment growth has been driven by limited-service eating places, which generated about half (49%) of new jobs in the industry during this period.

Hourly and weekly earnings

Jobs in the food services and drinking places industry are relatively low paid. The average wage for workers paid by the hour in 2006 was $10.33, well below the average for all industries ($18.67). In addition, wages in the industry grew slower (+6.4%) than the all-industry average (+13.7%) from 1998 to 2006.

[3] Employment and earnings data is based on information from Statistics Canada's *Survey of Employment, Payrolls and Hours* (SEPH). The SEPH data provides more detailed estimates at the industry level compared to the *Labour Force Survey*. However, employment estimates from SEPH exclude the self-employed and therefore underestimate the size of the workforce.

Below-average wages characterize the food services and drinking places industry



Data Source: Statistics Canada

In 2006, employees who were paid by the hour earned $238 per week on average. In comparison, weekly wages across all industries ($580) were more than double those in the food services and drinking places industry.

However, wage data tends to underestimate the earnings of workers in this industry, as their income is supplemented with tips received from customers. It is reasonable to assume that average weekly wages could be 10-15% higher than the SEPH estimates indicate if tips are taken into account.

Worker characteristics[4]

Relatively low earnings in the industry reflect the extent to which employers rely on part-time workers. Most (68%) employees in the food services and drinking places industry worked on a part-time basis (less than 30 hours per week) in 2006. This was well above the average for all industries (25%).

In addition, below-average wages also reflect the high proportion of younger workers in the industry. Although the age distribution of the workforce is not available specifically for the food services and drinking places industry, data for the accommodation and food services industry indicates that 43% of employees in 2006 were between the ages of 15 and 24. This was significantly higher than the average for the service sector and the total provincial workforce (each at 16%). These findings suggest that the industry is an important source of entry-level employment opportunities for young people.

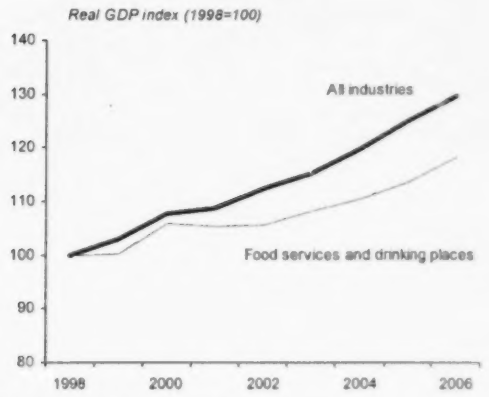
The unemployment rate in the industry averaged 4.9% in 2006, similar to the all-industry average (4.8%). Compared to the service sector (3.0%), workers in the food services and drinking places industry were more likely to be unemployed at some point during the year. This is not a surprising result, given the number of 15-24 year olds in the industry's workforce, who tend to experience the highest unemployment rates.

Industry growth

In 2006, the industry's GDP advanced 4.0% to $2.6 billion, above the all-industry average (+3.6%). However, GDP growth in the industry is typically slower than the BC economy as a whole. From 1998 to 2006, food services and drinking places recorded an 18.2% increase in economic output, below the rate for all industries (+29.6%).

[4] Information in this section is based on data from the *Labour Force Survey*.

The industry's GDP has increased steadily since 2003



Data Source: Statistics Canada

Although the food services and drinking places industry stalled in 2001 and 2002, its GDP growth has been steady since 2003. The performance of this industry is closely linked to overall economic conditions, and when the economy is expanding, people tend to spend more on discretionary expenditures such as eating out at restaurants and pubs. As consumer spending is forecast to remain strong over the next few years, the food services and drinking places industry will likely continue to reap the benefits.

Table 1: Room Revenue by Development Region ($000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
Annual data									
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,245	863,420	229,551	76,957	46,198	20,104	8,811	51,889	1,592,176
2005	310,117	904,553	250,184	78,922	52,134	20,779	10,152	63,252	1,690,093
2006	324,697	977,811	273,004	85,082	56,607	21,927	10,403	72,632	1,822,163
Annual growth rates									
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.6	7.3	3.8	-1.3	12.2	7.1
2005	5.0	4.8	9.0	2.6	12.8	3.4	15.2	21.9	6.1
2006	4.7	8.1	9.1	7.8	8.6	5.5	2.5	14.8	7.8
Monthly data									
Nov-06	28,180	86,109	23,470	7,081	4,858	1,982	918	6,407	159,005
Dec-06	28,423	83,273	23,803	7,637	5,052	2,039	910	5,469	156,606
Jan-07	29,674	86,298	27,667	7,503	5,022	2,068	944	5,351	164,525
Feb-07	28,137	86,487	24,447	7,765	4,994	2,068	874	4,405	159,176
Mar-07	29,194	87,634	25,189	7,785	5,039	2,257	1,001	5,288	163,388
Apr-07	29,329	87,790	25,077	7,510	4,770	2,272	987	5,543	163,278
May-07	29,209	85,993	25,191	7,916	5,108	2,203	1,127	5,748	162,495
Jun-07	29,183	86,318	25,977	8,229	4,916	2,400	978	5,987	163,989
Jul-07	29,611	84,166	25,484	8,081	4,837	2,378	1,031	5,895	161,482
Aug-07	28,438	85,924	25,605	8,230	5,005	2,458	1,068	6,045	162,774
Sep-07	29,583	87,211	25,408	8,207	4,986	2,371	1,079	5,632	164,478
Oct-07	29,374	89,745	25,442	8,558	5,395	2,391	1,101	5,438	167,442
Nov-07	29,454	88,607	26,456	9,023	5,568	2,346	1,113	5,451	168,017
Month-over-month growth rates									
Nov-06	2.0	2.1	-2.2	-4.1	2.0	2.9	1.3	11.3	1.5
Dec-06	0.9	-3.3	1.4	7.8	4.0	2.9	-0.9	-14.6	-1.5
Jan-07	4.4	3.6	16.2	-1.8	-0.6	1.4	3.7	-2.2	5.1
Feb-07	-5.2	0.2	-11.6	3.5	-0.6	0.0	-7.4	-17.7	-3.3
Mar-07	3.8	1.3	3.0	0.3	0.9	9.2	14.6	20.0	2.6
Apr-07	0.5	0.2	-0.4	-3.5	-5.4	0.7	-1.4	4.8	-0.1
May-07	-0.4	-2.0	0.5	5.4	7.1	-3.0	14.2	3.7	-0.5
Jun-07	-0.1	0.4	3.1	4.0	-3.8	9.0	-13.3	4.2	0.9
Jul-07	1.5	-2.5	-1.9	-1.8	-1.6	-0.9	5.4	-1.5	-1.5
Aug-07	-4.0	2.1	0.5	1.9	3.5	3.4	3.6	2.6	0.8
Sep-07	4.0	1.5	-0.8	-0.3	-0.4	-3.5	1.1	-6.8	1.0
Oct-07	-0.7	2.9	0.1	4.3	8.2	0.8	2.0	-3.4	1.8
Nov-07	0.3	-1.3	4.0	5.4	3.2	-1.9	1.1	0.2	0.3

November month-over-month percent growth

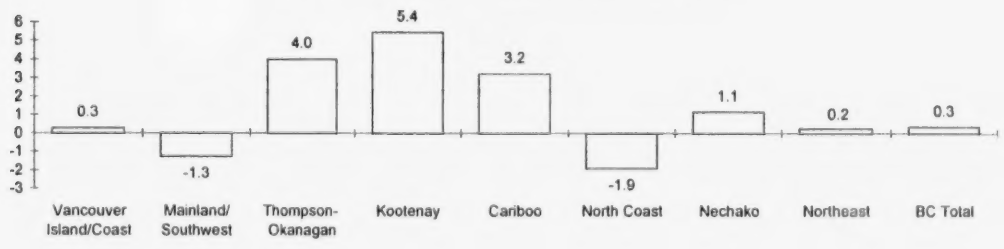


Table 2: Room Revenue by Accommodation Type ($000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			
Annual data							
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,673	195,057	124,438	98,902
2005	483,529	211,406	346,496	203,087	210,872	133,422	101,283
2006	513,978	230,059	379,559	221,171	234,119	135,298	107,979
Annual growth rates							
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.5	7.5	4.1	3.6
2005	3.4	6.4	7.7	9.4	8.1	7.2	2.4
2006	6.3	8.8	9.5	8.9	11.0	1.4	6.6
Monthly data							
Nov-06	44,423	20,859	33,204	19,968	19,949	12,049	9,461
Dec-06	43,704	19,899	33,005	18,823	20,643	11,417	9,799
Jan-07	45,251	20,590	33,799	19,198	22,422	11,921	10,038
Feb-07	44,918	20,659	33,874	18,718	21,280	11,676	9,953
Mar-07	44,914	21,132	34,345	19,184	20,590	12,126	10,426
Apr-07	45,176	20,973	34,640	19,625	20,696	12,227	10,029
May-07	42,927	21,453	35,045	20,559	20,274	12,302	10,266
Jun-07	43,045	20,916	35,237	20,166	20,308	12,897	10,391
Jul-07	42,369	20,727	35,407	20,005	19,472	12,265	10,390
Aug-07	43,694	20,515	35,884	19,934	19,700	12,232	10,698
Sep-07	45,616	21,125	36,260	20,103	19,695	12,038	10,581
Oct-07	46,254	22,084	36,756	20,245	20,101	11,802	10,574
Nov-07	45,314	21,388	36,970	20,136	20,302	11,455	11,005
Month-over-month growth rates							
Nov-06	0.7	0.9	1.1	6.0	-0.8	5.1	-1.0
Dec-06	-1.6	-4.6	-0.6	-5.7	3.5	-5.2	3.6
Jan-07	3.5	3.5	2.4	2.0	8.6	4.4	2.4
Feb-07	-0.7	0.3	0.2	-2.5	-5.1	-2.1	-0.8
Mar-07	0.0	2.3	1.4	2.5	-3.2	3.9	4.7
Apr-07	0.6	-0.8	0.9	2.3	0.5	0.8	-3.8
May-07	-5.0	2.3	1.2	4.8	-2.0	0.6	2.4
Jun-07	0.3	-2.5	0.5	-1.9	0.2	4.8	1.2
Jul-07	-1.6	-0.9	0.5	-0.8	-4.1	-4.9	0.0
Aug-07	3.1	-1.0	1.3	-0.4	1.2	-0.3	3.0
Sep-07	4.4	3.0	1.0	0.8	0.0	-1.6	-1.1
Oct-07	1.4	4.5	1.4	0.7	2.1	-2.0	-0.1
Nov-07	-2.0	-3.2	0.6	-0.5	1.0	-2.9	4.1

November month-over-month percent growth

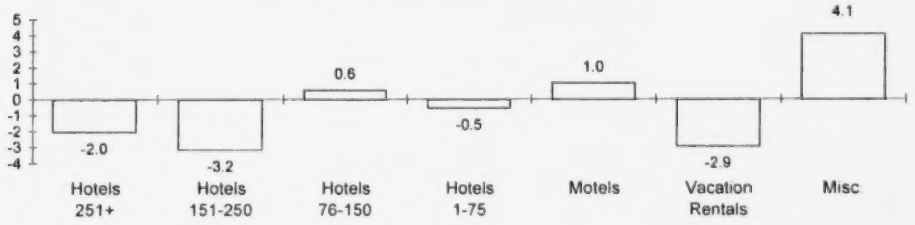


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000) Nov-07	Revenue ($000) YTD 07	Revenue % change from Nov-06	Revenue % change from YTD 06	Properties (#) Nov-07	Properties # chg from Nov-06	Rooms (#) Nov-07	Rooms # chg from Nov-06
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	**8,508**	**183,163**	**-0.4**	**6.2**	**148**	**0**	**8,066**	**34**
Total - Hotels	6,980	148,485	-2.4	6.2	66	3	5,582	87
76+ Rooms	5,348	113,141	-4.3	6.2	26	0	3,927	0
1-75 Rooms	1,632	35,344	4.5	6.0	40	3	1,655	87
Motels	828	16,410	6.1	6.9	20	-5	921	-139
Vacation Rentals	205	4,774	18.1	-11.8	25	2	283	66
19 Cowichan Valley								
Total - All accommodation types	**580**	**9,439**	**10.8**	**10.8**	**29**	**-4**	**585**	**-49**
Motels	122	2,170	19.2	20.1	13	-3	250	-60
21 Nanaimo								
Total - All accommodation types	**2,636**	**44,884**	**13.7**	**9.9**	**61**	**1**	**2,530**	**152**
Total - Hotels	1,500	22,100	6.9	7.6	18	0	1,095	0
Motels	488	8,777	14.1	12.6	22	0	627	0
Vacation Rentals	567	11,898	34.1	11.5	17	1	693	153
23 Alberni-Clayoquot								
Total - All accommodation types	**2,354**	**47,473**	**20.1**	**13.9**	**51**	**-4**	**1,390**	**-34**
Motels	166	4,159	-9.1	-2.1	17	-2	354	-27
Vacation Rentals	937	18,623	32.9	18.4	14	0	348	10
25 Comox-Strathcona								
Total - All accommodation types	**1,672**	**36,978**	**6.2**	**11.5**	**56**	**10**	**1,488**	**40**
Total - Hotels	680	10,985	4.6	19.8	11	2	534	43
Motels	546	8,518	4.8	11.0	21	1	584	12
Vacation Rentals	48	4,535	11.3	19.6	14	5	147	27
27 Powell River								
Total - All accommodation types	**306**	**4,817**	**-8.0**	**5.6**	**19**	**2**	**397**	**11**
Total - Hotels	211	2,874	-16.5	-1.0	10	0	289	0
43 Mount Waddington								
Total - All accommodation types	**366**	**7,231**	**37.1**	**16.4**	**14**	**-3**	**565**	**-26**
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	**2,904**	**43,277**	**1.0**	**4.9**	**67**	**0**	**2,464**	**12**
Total - Hotels	2,216	30,113	0.5	2.9	20	0	1,427	0
Motels	577	9,387	-0.4	8.5	34	0	886	16
15 Greater Vancouver								
Total - All accommodation types	**49,322**	**741,165**	**3.2**	**4.1**	**228**	**-3**	**25,544**	**-573**
Total - Hotels	47,309	701,025	3.2	4.4	159	-5	22,749	-584
251+ Rooms	24,021	352,277	2.6	0.0	22	-1	8,940	-312
151-250 Rooms	10,069	144,536	5.9	10.7	26	-1	5,061	-113
76-150 Rooms	10,010	148,269	4.7	7.8	54	0	5,824	0
1-75 Rooms	3,209	55,943	-4.4	9.4	57	-3	2,924	-159
Motels	1,204	19,509	-4.0	4.2	32	-1	1,395	-98
Vacation Rentals	437	9,745	6.7	13.1	17	1	485	-105
29 Sunshine Coast								
Total - All accommodation types	**295**	**6,329**	**-26.4**	**14.1**	**15**	**-1**	**300**	**-48**
31 Squamish-Lillooet								
Total - All accommodation types	**5,257**	**174,237**	**15.2**	**16.9**	**76**	**-17**	**5,555**	**-1,774**
Total - Hotels	4,667	146,620	17.8	15.1	35	-12	4,398	-1,309
76+ Rooms	4,245	136,891	21.1	15.9	20	-7	3,895	-1,115
1-75 Rooms	423	9,730	-8.0	4.8	15	-5	503	-194
Vacation Rentals	306	20,703	-4.4	30.5	22	-2	788	-385
Miscellaneous	155	4,817	-6.5	20.0	12	-2	180	-75

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue ($000)		Revenue % change from		Properties (#)	Properties # chg from	Rooms (#)	Rooms # chg from
	Nov-07	YTD 07	Nov-06	YTD 06	Nov-07	Nov-06	Nov-07	Nov-06
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	**1,800**	**52,183**	**5.8**	**10.7**	**87**	**5**	**2,818**	**89**
Total - Hotels	1,113	24,075	6.7	8.1	15	-1	1,115	-35
Motels	534	20,393	7.0	7.5	54	3	1,398	120
33 Thompson-Nicola								
Total - All accommodation types	**3,564**	**73,008**	**20.0**	**7.5**	**122**	**-4**	**4,988**	**-84**
Total - Hotels	1,896	34,349	25.3	11.0	30	-2	2,053	-109
76+ Rooms	1,697	28,939	39.8	16.7	13	1	1,475	87
1-75 Rooms	199	5,410	-33.5	-11.8	17	-3	578	-196
Motels	1,356	23,973	11.2	3.0	71	-2	2,138	-103
Miscellaneous	110	5,795	-10.3	16.2	10	1	450	215
35 Central Okanagan								
Total - All accommodation types	**3,789**	**88,923**	**11.4**	**17.5**	**48**	**-1**	**3,434**	**60**
Total - Hotels	2,968	57,187	16.6	13.7	17	-1	1,736	30
Motels	623	13,645	25.4	4.7	19	0	894	2
37 North Okanagan								
Total - All accommodation types	**1,346**	**24,049**	**6.4**	**10.9**	**37**	**-1**	**1,588**	**24**
Total - Hotels	587	12,362	-1.6	-0.2	12	0	779	0
Motels	371	7,268	6.5	5.8	16	-1	533	-26
39 Columbia-Shuswap								
Total - All accommodation types	**1,795**	**51,097**	**19.5**	**13.3**	**73**	**3**	**2,870**	**112**
Total - Hotels	975	20,908	33.6	15.9	19	0	1,116	3
Motels	724	19,482	6.2	9.1	36	-4	1,424	-53
Miscellaneous	49	6,615	30.9	22.9	14	6	276	153
Kootenay								
01 East Kootenay								
Total - All accommodation types	**2,184**	**57,450**	**29.2**	**13.7**	**95**	**7**	**4,178**	**269**
Total - Hotels	1,001	22,005	26.8	29.6	31	3	1,788	218
76+ Rooms	726	15,204	42.2	37.3	11	2	1,067	197
1-75 Rooms	275	6,801	-1.4	15.2	20	1	721	21
Motels	541	10,799	25.3	5.5	35	1	809	-16
Vacation Rentals	226	12,574	36.5	11.3	12	0	897	-22
03 Central Kootenay								
Total - All accommodation types	**1,327**	**24,032**	**18.8**	**13.2**	**57**	**-2**	**1,444**	**13**
Total - Hotels	791	12,727	12.6	12.0	16	0	743	-1
Motels	388	6,072	22.6	15.2	27	-1	509	-17
Vacation Rentals	120	2,495	44.6	17.2	10	2	84	29
05 Kootenay Boundary								
Total - All accommodation types	**619**	**8,498**	**55.0**	**18.7**	**29**	**-3**	**653**	**-29**
Motels	271	3,858	14.8	4.9	21	-2	411	-21
Cariboo								
41 Cariboo								
Total - All accommodation types	**1,336**	**20,326**	**17.6**	**4.7**	**55**	**-4**	**1,613**	**-92**
Total - Hotels	374	5,912	4.3	4.6	10	-1	520	-7
Motels	864	10,683	26.2	6.3	30	-3	904	-88
53 Fraser-Fort George								
Total - All accommodation types	**2,844**	**36,945**	**14.2**	**8.9**	**50**	**3**	**2,584**	**157**
Total - Hotels	2,234	26,626	13.7	9.7	20	1	1,536	74
Motels	599	9,155	15.4	6.4	26	-1	933	-25

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Nov-07	YTD 07	Nov-06	YTD 06	Nov-07	Nov-06	Nov-07	Nov-06
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	**631**	**16,719**	**24.1**	**36.1**	**29**	**1**	**954**	**16**
Motels	181	2,872	67.9	32.8	10	10	323	-5
49 Kitimat-Stikine								
Total - All accommodation types	**738**	**10,584**	**12.0**	**20.4**	**31**	**0**	**797**	**20**
Motels	304	4,184	8.3	35.1	17	0	415	17
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	**852**	**11,761**	**20.6**	**19.2**	**40**	**0**	**1,021**	**10**
Motels	495	6,353	29.8	12.3	21	0	601	5
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	**5,136**	**62,750**	**-13.6**	**-7.9**	**63**	**-1**	**3,339**	**114**
Total - Hotels	3,587	36,257	26.1	16.0	28	3	2,018	341
Motels	1,130	17,601	-40.8	-24.9	28	-4	850	-175

Note: Data for regions with fewer than 10 properties reporting cannot be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	($000)		% change from		(#)	# chg from	(#)	# chg from
	Nov-07	YTD 07	Nov-06	YTD 06	Nov-07	Nov-06	Nov-07	Nov-06
Vancouver Island/Coast	**16,462**	**336,105**	**5.8**	**8.6**	**383**	**2**	**15,108**	**128**
Victoria (C)	6,812	147,496	-2.5	6.7	76	-2	5,717	-18
Other CRD	1,132	25,210	5.7	-0.6	59	-2	1,949	-39
Nanaimo (C)	1,743	24,574	7.8	13.8	22	0	1,230	0
Port Alberni (C)	271	4,787	-17.1	6.7	11	-2	347	-24
Courtenay (C)	661	11,166	10.0	16.2	11	1	436	34
Rest of Development Region	5,843	122,871	18.0	11.5	215	8	5,429	175
Mainland/Southwest	**57,778**	**965,008**	**3.8**	**6.3**	**386**	**-21**	**33,863**	**-2,383**
Downtown Vancouver (C)	28,594	450,947	2.0	1.4	78	-6	12,408	-686
Other Vancouver (C)	2,503	45,378	-2.4	8.9	32	-1	2,870	-5
Richmond (C)	9,617	122,578	4.6	7.6	23	0	4,079	0
Burnaby (C)	2,161	29,122	8.9	9.8	10	0	1,321	447
Other GVRD	6,442	93,101	6.9	9.9	81	0	4,839	91
Whistler (DM)	4,676	164,686	17.2	16.6	52	-17	4,859	-1,805
Rest of Development Region	3,785	59,196	-1.7	8.4	110	3	3,487	-425
Thompson/Okanagan	**12,294**	**289,260**	**13.4**	**12.4**	**367**	**2**	**15,698**	**201**
Penticton (C)	879	27,413	-7.4	5.9	35	0	1,507	0
Kamloops (C)	2,671	53,662	25.2	8.7	62	-1	3,700	105
Kelowna (C)	3,476	77,930	9.6	15.3	38	-2	2,798	32
Vernon (C)	1,191	22,359	11.8	12.3	31	1	1,464	39
Revelstoke (C)	806	17,365	49.0	14.3	25	5	1,033	159
Rest of Development Region	3,270	90,530	9.8	13.8	176	-1	5,196	-134
Kootenay	**4,130**	**89,981**	**28.8**	**14.0**	**181**	**2**	**6,275**	**253**
Cranbrook (C)	724	10,813	26.2	23.9	18	2	881	116
Nelson (C)	411	7,879	43.1	14.8	12	-1	438	-45
Rest of Development Region	2,994	71,289	27.7	12.6	163	0	5,394	137
Cariboo	**4,180**	**57,271**	**15.2**	**7.3**	**105**	**-1**	**4,197**	**65**
Quesnel (C)	315	3,817	32.5	2.1	11	0	418	0
Williams Lake (C)	453	6,008	13.8	9.5	10	-1	481	-55
Prince George (C)	2,358	27,436	14.5	8.4	27	0	1,793	54
Rest of Development Region	1,054	20,011	13.1	6.3	57	0	1,505	66
North Coast	**1,369**	**27,303**	**17.3**	**29.5**	**60**	**1**	**1,751**	**36**
Prince Rupert (C)	494	8,767	22.0	30.9	15	0	762	1
Terrace (C)	474	5,978	10.9	17.2	11	1	405	10
Rest of Development Region	401	12,559	19.7	35.4	34	0	584	25
Nechako	**852**	**11,761**	**20.6**	**19.2**	**40**	**0**	**1,021**	**10**
Smithers (T)	418	6,112	18.3	29.4	16	2	428	15
Rest of Development Region	434	5,650	22.8	9.9	24	-2	593	180
Northeast	**5,136**	**62,750**	**-13.6**	**-7.9**	**63**	**-1**	**3,339**	**114**
Dawson Creek (C)	1,433	11,558	58.4	1.2	16	1	649	93
Fort St. John (C)	1,573	21,760	-30.1	-16.5	12	-4	846	-251
Rest of Development Region	2,130	29,433	-23.7	-3.9	35	2	1,844	272

Note: Data for regions with fewer than 10 properties reporting cannot be released.

Table 5: Historical Unadjusted Room Revenue by Development Region ($000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,245	863,420	229,551	76,957	46,198	20,104	8,811	51,889	1,592,176
2005	310,117	904,553	250,184	78,922	52,134	20,779	10,152	63,252	1,690,093
2006	324,697	977,811	273,004	85,082	56,607	21,927	10,403	72,632	1,822,163
Annual growth rates									
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.6	7.3	3.8	-1.3	12.2	7.1
2005	5.0	4.8	9.0	2.6	12.8	3.4	15.2	21.9	6.1
2006	4.7	8.1	9.1	7.8	8.6	5.5	2.5	14.8	7.8
Monthly data									
Nov-06	15,554	55,638	10,841	3,207	3,627	1,168	706	5,946	96,687
Dec-06	15,200	70,266	15,541	6,169	3,252	851	539	4,530	116,348
Jan-07	13,239	72,739	18,088	6,960	3,150	861	588	5,703	121,327
Feb-07	16,124	80,190	18,857	8,879	3,369	1,226	600	6,077	135,322
Mar-07	22,176	90,348	22,389	8,757	4,367	1,520	833	7,459	157,848
Apr-07	23,977	72,645	16,745	5,370	4,220	1,338	673	4,772	129,740
May-07	31,697	86,523	24,389	6,441	5,532	2,112	1,066	4,009	161,769
Jun-07	38,098	102,825	30,738	7,940	6,000	4,190	1,224	5,588	196,603
Jul-07	51,836	109,816	45,394	12,379	7,056	4,767	1,405	6,232	238,884
Aug-07	56,316	119,436	51,836	13,629	7,410	4,822	1,574	6,401	261,424
Sep-07	41,871	99,272	30,515	9,494	6,525	3,374	1,578	5,860	198,489
Oct-07	24,309	73,436	18,017	6,002	5,462	1,724	1,368	5,513	135,831
Nov-07	16,462	57,778	12,294	4,130	4,180	1,369	852	5,136	102,202
Year-over-year percent changes									
Nov-06	3.9	2.1	6.8	6.1	8.7	16.1	8.1	22.9	4.6
Dec-06	3.3	4.1	7.4	18.3	6.9	22.7	3.1	-1.0	5.1
Jan-07	11.0	12.4	24.1	7.0	10.2	24.1	13.3	4.6	13.1
Feb-07	4.0	15.0	11.8	18.3	10.5	13.5	0.4	-3.5	12.2
Mar-07	11.9	13.7	18.9	15.3	8.8	31.7	21.3	-5.1	13.2
Apr-07	9.9	11.2	10.4	6.8	0.1	29.3	23.2	-7.8	9.7
May-07	9.3	4.6	13.0	12.3	9.6	19.6	32.0	-13.1	6.9
Jun-07	8.6	1.3	16.9	18.9	6.6	35.3	10.7	-9.8	5.9
Jul-07	11.1	-1.2	9.8	13.2	2.1	32.4	15.1	-11.6	4.4
Aug-07	6.6	3.4	11.0	12.9	7.5	41.0	22.6	-7.9	6.4
Sep-07	9.6	6.1	8.6	11.8	4.0	26.4	21.0	-12.6	7.1
Oct-07	5.2	7.9	4.9	16.4	13.0	23.9	25.9	-6.0	7.3
Nov-07	5.8	3.8	13.4	28.8	15.2	17.3	20.6	-13.6	5.7

November year-over-year percent change

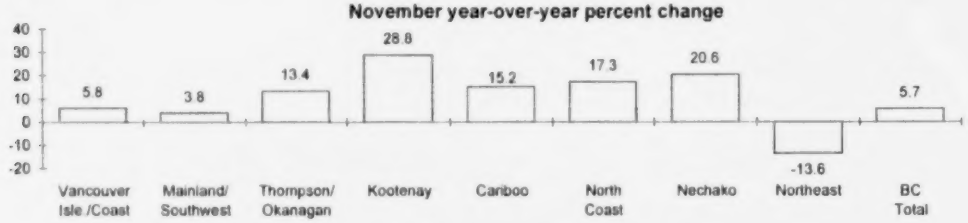


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
2003	7,335.3	6,137.4	2,580.7	3,556.8	1,197.8	577.6	410.1	124.8
2004	7,447.7	6,039.1	2,477.6	3,561.5	1,408.7	715.8	458.1	144.3
2005	7,224.8	5,751.0	2,314.5	3,436.5	1,473.8	723.5	493.7	157.1
2006	6,846.0	5,379.8	1,944.6	3,435.2	1,466.1	716.9	492.7	154.7
2007	6,576.8	5,062.0	1,709.2	3,352.8	1,514.8	699.3	519.0	175.4
Annual percent changes								
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.5	-1.6	-4.0	0.1	17.6	23.9	11.7	15.6
2005	-3.0	-4.8	-6.6	-3.5	4.6	1.1	7.8	8.9
2006	-5.2	-6.5	-16.0	0.0	-0.5	-0.9	-0.2	-1.5
2007	-3.9	-5.9	-12.1	-2.4	3.3	-2.5	5.3	13.4
Monthly data								
Dec-06	561	436	153	283	125	61	41	13
Jan-07	570	445	153	292	125	60	43	13
Feb-07	565	438	151	288	126	59	44	13
Mar-07	560	434	153	281	126	60	43	14
Apr-07	551	429	147	281	122	57	42	14
May-07	566	439	148	291	127	58	43	15
Jun-07	556	427	143	284	128	58	45	15
Jul-07	520	393	137	255	128	60	45	14
Aug-07	541	414	140	273	127	59	44	15
Sep-07	542	414	138	276	128	59	45	15
Oct-07	537	417	135	282	121	54	42	15
Nov-07	538	412	135	277	126	58	41	16
Dec-07	531	402	130	272	129	58	43	17
Month-over-month growth rates								
Dec-06	0.3	-0.1	5.8	-3.0	1.6	3.3	-2.3	5.8
Jan-07	1.6	1.9	-0.5	3.2	0.3	-2.4	5.5	-3.7
Feb-07	-1.0	-1.4	-1.4	-1.5	0.6	-1.3	2.3	2.1
Mar-07	-0.8	-1.1	1.4	-2.4	0.1	0.6	-2.2	4.2
Apr-07	-1.6	-1.1	-3.5	0.2	-3.1	-4.5	-2.4	2.9
May-07	2.7	2.3	0.4	3.3	4.1	2.3	3.9	7.3
Jun-07	-1.8	-2.6	-3.4	-2.2	0.8	0.1	3.7	-3.4
Jul-07	-6.3	-8.1	-3.8	-10.2	-0.6	2.2	-1.3	-2.4
Aug-07	4.0	5.4	2.2	7.1	-0.4	-1.0	-0.6	2.0
Sep-07	0.2	0.1	-1.5	0.9	0.5	-0.2	1.2	1.0
Oct-07	-0.8	0.6	-2.7	2.2	-5.3	-8.4	-7.2	3.6
Nov-07	0.1	-1.1	0.3	-1.9	4.6	7.6	-2.1	8.5
Dec-07	-1.4	-2.4	-3.8	-1.8	2.0	-0.1	6.1	3.2

* Seasonally adjusted visitor entries are calculated by Statistics Canada, and are adjusted to sum to national totals.

** Australia, New Zealand, and other South Pacific nations.

SOURCE: BC STATS, Statistics Canada.

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy
	Total	Domestic	Trans-border	Other Int'l.	Total	Vehicles	Passengers	Passenger Vehicles
Annual data								
2003	14,321	7,267	3,814	3,241	1,183	8,263	21,348	2,480
2004	15,726	7,986	3,965	3,776	1,250	8,532	21,955	2,586
2005	16,419	8,348	4,107	3,965	1,318	8,539	21,791	2,635
2006	16,924	8,712	4,253	3,959	1,390	8,530	21,689	2,601
2007	17,495	9,017	4,361	4,117	1,482	8,558	21,690	2,730
Annual growth rates								
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3
2005	4.4	4.5	3.6	5.0	5.5	0.1	-0.7	1.9
2006	3.1	4.4	3.6	-0.1	5.4	-0.1	-0.5	-1.3
2007	3.4	3.5	2.6	4.0	6.6	0.3	0.0	5.0
Monthly data								
Dec-06	1,446	734	381	331	115	715	1,801	191
Jan-07	1,439	739	375	325	119	718	1,830	219
Feb-07	1,423	727	357	339	118	709	1,799	221
Mar-07	1,450	737	367	346	122	716	1,807	230
Apr-07	1,461	765	363	333	123	703	1,795	227
May-07	1,436	746	354	336	124	712	1,803	223
Jun-07	1,442	746	357	339	121	717	1,819	227
Jul-07	1,430	737	346	347	124	713	1,804	224
Aug-07	1,448	749	355	344	125	709	1,798	232
Sep-07	1,461	758	360	344	125	720	1,811	227
Oct-07	1,461	762	364	335	127	710	1,790	229
Nov-07	1,539	789	385	364	128	720	1,825	247
Dec-07	1,506	762	379	365	125	712	1,808	224
Month-over-month growth rates								
Dec-06	1.4	1.2	3.9	-1.2	-0.9	7.8	5.4	-4.5
Jan-07	-0.5	0.6	-1.5	-1.9	3.7	0.3	1.6	14.7
Feb-07	-1.1	-1.7	-4.7	4.5	-1.0	-1.2	-1.7	0.7
Mar-07	1.9	1.4	2.6	2.0	2.9	0.9	0.5	4.4
Apr-07	0.8	3.8	-1.0	-3.8	0.9	-1.7	-0.7	-1.5
May-07	-1.7	-2.5	-2.5	0.8	1.5	1.3	0.4	-1.6
Jun-07	0.4	0.0	0.9	1.0	-2.6	0.6	0.9	1.7
Jul-07	-0.8	-1.2	-3.2	2.5	2.3	-0.5	-0.8	-1.4
Aug-07	1.3	1.6	2.7	-0.8	0.9	-0.5	-0.3	3.8
Sep-07	0.9	1.3	1.2	-0.1	-0.2	1.5	0.7	-2.3
Oct-07	0.0	0.5	1.2	-2.5	1.8	-1.3	-1.1	0.8
Nov-07	5.3	3.6	6.0	8.6	0.9	1.4	1.9	7.9
Dec-07	-2.1	-3.4	-1.7	0.4	-2.3	-1.2	-1.0	-9.4

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry[2]		Consumer Price Index[1]	
	Total tourism related	Air transport[4]	Accom-modation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%)[3]	Room Rate ($)	Traveller accom-modation	Restaurant food[4]
Annual data									
2003	201.4	13.1	31.5	124.0	32.9	58.3	113.7	90.1	101.8
2004	205.7	12.9	31.5	125.8	35.4	61.3	115.7	82.5	103.6
2005	210.5	13.1	32.9	128.8	35.7	63.9	116.3	80.1	106.6
2006	221.9	13.6	35.2	135.1	37.9	65.7	122.0	77.5	109.3
2007	229.9	13.8	35.8	141.2	39.1	67.0	129.0	81.1	112.2
Annual Growth Rates									
2003	2.4	0.1	-0.4	3.3	2.7	-0.6	-2.8	-9.9	1.8
2004	2.1	-1.5	0.1	1.5	7.8	3.0	1.7	-8.4	1.8
2005	2.4	1.4	4.5	2.4	0.8	2.7	0.5	-3.0	2.9
2006	5.4	4.2	6.9	4.9	6.3	1.7	4.9	-3.2	2.5
2007	3.6	1.0	1.6	4.6	3.1	1.3	5.8	4.7	2.6
Monthly data									
Dec-06	227.5	13.8	35.4	139.1	39.1	66.3	121.50	78.5	112.1
Jan-07	226.7	13.9	35.2	138.9	38.7	67.5	126.10	79.4	111.5
Feb-07	227.8	13.7	35.1	139.8	39.2	66.8	126.80	80.4	111.0
Mar-07	228.3	13.8	35.4	140.1	39.0	66.8	128.20	80.8	110.8
Apr-07	228.5	13.8	35.7	140.2	38.9	67.0	128.20	81.2	110.9
May-07	229.2	13.8	35.5	140.5	39.3	66.9	128.00	81.3	111.0
Jun-07	230.3	13.9	35.5	141.8	39.1	66.8	127.70	79.0	111.8
Jul-07	229.8	14.0	35.5	141.2	39.1	66.2	128.10	81.1	113.2
Aug-07	229.4	13.7	35.2	141.4	39.0	66.4	129.00	81.4	113.3
Sep-07	231.2	13.7	35.9	142.3	39.2	67.2	130.20	81.0	113.2
Oct-07	231.7	13.6	36.0	142.7	39.4	67.7	132.00	81.6	113.2
Nov-07	233.0	13.6	37.5	142.7	39.2	68.0	131.90	82.8	113.1
Dec-07	233.0	13.6	37.0	143.3	39.2	66.9	132.00	83.3	113.0
Month-over-month growth rates									
Dec-06	-1.2	-0.9	-1.4	-1.7	0.6	-0.3	-2.6	0.0	0.2
Jan-07	-0.4	0.7	-0.6	-0.2	-1.1	1.2	3.8	1.1	-0.5
Feb-07	0.5	-1.1	-0.2	0.6	1.3	-0.7	0.6	1.3	-0.4
Mar-07	0.2	0.3	0.8	0.2	-0.5	0.0	1.1	0.5	-0.2
Apr-07	0.1	0.0	0.7	0.1	-0.4	0.2	0.0	0.5	0.1
May-07	0.3	0.0	-0.3	0.3	1.1	-0.1	-0.2	0.1	0.1
Jun-07	0.5	0.8	-0.1	0.9	-0.4	-0.1	-0.2	-2.8	0.7
Jul-07	-0.2	0.8	0.0	-0.4	-0.2	-0.6	0.3	2.7	1.3
Aug-07	-0.1	-2.4	-0.7	0.2	-0.1	0.2	0.7	0.4	0.1
Sep-07	0.8	-0.1	2.0	0.6	0.5	0.8	0.9	-0.5	-0.1
Oct-07	0.2	-0.6	0.1	0.3	0.5	0.5	1.4	0.7	0.0
Nov-07	0.5	0.1	4.2	0.0	-0.6	0.3	-0.1	1.5	-0.1
Dec-07	0.0	0.3	-1.4	0.4	-0.1	-1.1	0.1	0.6	-0.1

[1]Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats.
[2]Source: Pannell Kerr Forster and BC Stats.
[3]Occupancy Rate change expressed as percentage point change. [4]No identifiable seasonality.

Table 9: Food Services Receipts, Seasonally Adjusted

Period	Food Services and Drinking Places[1]					
	Receipts ($ million)					
	BC[2]			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services
Annual data						
2003	6,318.0	567.7	5,750.3	38,569.6	2,516.8	36,052.8
2004	6,686.9	604.0	6,082.9	40,409.0	2,595.0	37,814.1
2005	6,888.8	554.4	6,334.4	41,817.7	2,577.3	39,240.4
2006	7,371.0	436.3	6,934.6	44,218.3	2,464.6	41,753.7
2007	7,652.6	480.1	7,169.6	45,684.2	2,378.1	43,306.1
Annual growth rates						
2003	4.1	7.2	3.9	1.4	0.6	1.5
2004	5.8	6.4	5.8	4.8	3.1	4.9
2005	3.0	-8.2	4.1	3.5	-0.7	3.8
2006	7.0	-21.3	9.5	5.7	-4.4	6.4
2007	3.8	10.0	3.4	3.3	-3.5	3.7
Monthly data						
Dec-06	629	x	x	3,873	213	3,660
Jan-07	634	34	597	3,803	203	3,601
Feb-07	641	x	x	3,756	194	3,563
Mar-07	636	38	597	3,777	201	3,576
Apr-07	625	35	591	3,722	199	3,523
May-07	631	36	598	3,767	200	3,567
Jun-07	626	39	591	3,778	202	3,576
Jul-07	621	42	580	3,783	205	3,578
Aug-07	633	x	x	3,778	204	3,573
Sep-07	638	42	597	3,859	199	3,660
Oct-07	653	45	610	3,889	194	3,696
Nov-07	667	x	x	3,910	190	3,720
Dec-07	647	48	599	3,864	189	3,675
Month-over-month growth rates						
Dec-06	3.2	x	x	4.4	4.4	4.4
Jan-07	0.9	x	x	-1.8	-4.7	-1.6
Feb-07	1.0	x	x	-1.2	-4.5	-1.1
Mar-07	-0.8	x	x	0.6	3.7	0.4
Apr-07	-1.6	-9.2	-1.2	-1.5	-0.9	-1.5
May-07	0.9	4.8	1.2	1.2	0.7	1.3
Jun-07	-0.8	5.9	-1.1	0.3	0.8	0.2
Jul-07	-0.7	10.0	-1.8	0.1	1.5	0.1
Aug-07	1.9	x	x	-0.1	-0.1	-0.1
Sep-07	0.8	x	x	2.1	-2.7	2.4
Oct-07	2.3	6.8	2.2	0.8	-2.7	1.0
Nov-07	2.1	x	x	0.5	-2.0	0.7
Dec-07	-3.0	x	x	-1.2	-0.5	-1.2

[1]Source: Statistics Canada & BC Stats

[2]Seasonally adjusted totals are calculated by Statistics Canada. Food Services and Drinking Places receipts are BC Stats estimates and may not sum exactly to provincial totals.

x = data not available

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Small Business and Revenue.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below $20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the *Hotel Room Tax Act* and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least 10 properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Labour and Citizens' Services, using data from the Consumer Taxation Branch of the Ministry of Small Business and Revenue.

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